



SchoolAuction.net

# Quick Start Guide

# Introduction

Welcome! We're excited to work with you this year on your auction. We have a lot of experience working with first-time users of our software—both first-time auction chairs and experienced chairs who have used another method in years past—and we're ready for your questions, with extensive documentation, videos, and demo sites you can use to explore all of the many ways you can use our software

This document is a little different from our other pieces—it doesn't explain *how* to do any particular thing in the software. Instead, this is an explanation of a number of core concepts that lie at the heart of our software. If you understand our thinking on these concepts, you will have an excellent idea of how our software is designed to work—and how you can work with it efficiently.

I encourage you to print this document and keep it next to your computer while you work, but please read through it at least once before you get too deep into the work. And please share it with your whole auction team.

We'll start with a short narrative to describe the most common use of our software. Even if it does not exactly describe your event or usage plans (and for the record, we are well aware that there are as many ways to design an auction as there are auctions), please read

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# Introduction

it, as it provides a context for understanding some of the basic, core concepts that underpin our software design. These core concepts will be *italicized* and will also appear after the story, in a glossary.

Also scattered throughout this narrative are some tips, entitled “Make Yourself Happy. ” These tips concern places in our software where you can choose to do things an easy way or a hard way. The hard way can work, and sometimes may be necessary, but if at all possible, we’d advise you to take the easy way. After all, auctions are already enough work.

Ready? Let’s get started!

# Registration

You will use our software to register your guests/bidders. For a *gala auction*, this will happen either by asking them to purchase *tickets* through the public-facing online ticket-sales page built into the site, or by entering ticket sales behind the scenes yourself. This will create a *bidder number* for them, and enable you to check them in on event-night. When they purchase their ticket, Each ticket sold or entered creates a bidder number for that guest, and enables you to check them in on event night. Each ticket purchase generates an *order*.

## Make Yourself Happy

Tickets can be assigned or unassigned. It's okay (and usually unavoidable) to have unassigned tickets, but tickets that have real names and email addresses are better—those guests will have more flexible and better check-in options.

## Make Yourself Happy

If you want to offer your guests the option to buy things like raffle tickets or valet parking when they purchase their auction tickets, you can do so easily. Enter these items not as ticket types, but as *Add-On Items*. In our software, “tickets” are used for admission and to generate a bidder number. You don't want those guests to have multiple bidder numbers, so be sure to sell drink tickets and other non-admission tickets as Add-On Items.

For an *online auction*, you'll direct your supporters to the online-bidding registration page, where they will enter their email address, and select a bidding name (if they don't want to use their real name). If you are running a *hybrid auction*, and the supporter already has purchased a ticket for the gala auction, then their online bidding name will be automatically linked to their existing record.

# Tracking Item Donors and the Items They Donate

You'll also use our software to keep a record of your *donors*. As we use it, this term only refers to entities that give you items to sell in your auction. Every item you sell has to have a donor—even your raffle tickets and paddle raise pledges. So you'll want to create a catch-all donor (we suggest "Friends of [your organization name]") for those.

And of course, you'll use it to track all of your items. These come in a variety of *item types*. An item's type defines the tax deduction calculation when it's sold, and what type of printouts the software creates for it. The item types are a fixed list; you can't change them.

Silent, sellable, and signup items are sold using one of three bidding methods—*Paper Bid Sheets*; *Online/Mobile Bidding*; or *Online Pre-Event, Paper Bid Sheets at Event*.

Groups with a Standard Subscription can sell Live and Paddle Raise (Cash Donation) items only via *Bid Paddles*; Plus and Premium Subscribers have the option to sell these via *Online/Mobile Bidding* if desired. Raffle items can only be sold via paper bid sheets—due to the tangle of local laws concerning the sale of raffle tickets online.

## Make Yourself Happy

Items can be arranged and rearranged in many ways, but please take a tip from us: get all of them entered first without worrying about their item numbers or order, and then arrange them a week or so before your event.

# Tracking Item Donors and the Items They Donate

The software also allows you to sell fixed-price items as Add-On Items during the ticket-sales process and on the [Donate Now Page](#). As mentioned above, Add-On Items are the best way to sell drink tickets online, as well as “upgrades” to the guest experience at your gala, such as child care, or a ride on the party bus going to and from your auction.

# Printing Your Bid Sheets, Etc.

After you arrange your items, you will use the software to generate your printed materials—bid sheets, description sheets, gift certificates, bidder numbers, and more. You can even generate a formatted list of all your items, which can serve as a starting point for a printed auction catalog.

# Managing Event Night

On event night, you'll use our software to bring it all together—checking guests in, selling them items, and checking them out. At its heart, auction night is that simple—as long as your guest list is clean and your items are set up properly, everything will run smoothly.

## Make Yourself Happy

Use the Advance Check-In feature to let your guests check in from home before they get to the auction, and plan to use the Self Check-Out feature to let them see what they won and pay for their purchases from their smartphones at the end of the evening. Not only does this cut down on work from your volunteers, your guests will love it.

When the auction is over, everyone who spent money will have an *order* in the system. These orders are the fundamental units of your event fundraiser—the building blocks from which your community constructed your auction success from. If you need to make any adjustments after the event, you will do so by going into the orders and making the changes there.

## Make Yourself Happy

Learn how to work with orders early on. Doing so is the key to knowing how to correct all sorts of problems—from your ticket buyers purchasing the wrong tickets, to returning an item and issuing a refund after your auction. We have a training site filled with sample data; feel free to login and play around with the orders there until you know how it works.

Go to [webinar.schoolauction.net/preassigned/login](https://webinar.schoolauction.net/preassigned/login) and login as a chair (the username and password are posted on that page).

You will also be able to tell the story of your auction through our reporting function. Start at the dashboards on the Reports page, and then click through on any of the lines for a detailed breakdown. All reports can be customized and downloaded to Excel files (.csv) for further fun.



# Managing Event Night

## ■ Make Yourself Happy

Learn to look for and use the *Customize button*—it's at the top right of any *Data Page* (Donors, Items, Tickets, Orders, Users). The customizations you make only apply to you—anyone else logged in can customize their screen the way that works best for them.

That's the basic narrative; of course there will be wrinkles that are unique to your event. Our support team is available to you to help you figure these out—just email them at [support@schoolauction.net](mailto:support@schoolauction.net). And please remember to tell them which school or organization you are with.

# Glossary

## Add-On Items

Fixed-price items that can be sold alongside your admission tickets, or from the Donate Now page.

## Admin

A role that you can assign to members of your auction team, when you set up *user* accounts for them. This is a powerful role, it allows that user to mess with almost all of the site settings.

Learn more about roles here: [Help Docs: Creating User Accounts](#)

## Bidders

Any member of your community who participates in your fundraiser. Also called *guests* when you're having a gala fundraiser. Note: outside of the software, you do not have to call them either of those things, but when we communicate to you and want to refer to the people who participate in your event we will call them either *bidders* or *guests*.

## Bidder Number

Bidder numbers are automatically assigned to any guest with a ticket. This number can be changed by an admin or chair, up until the time that the guest checks in.

## Chair

A role that you can assign to members of your auction team, when you set up *user* accounts for them. Everyone listed on your *Manager* account page is automatically given Chair Privileges. Chairs are the only team members who can set up credit-card processing.

# Glossary

## Data Page

Any screen in our software that is formatted as a table. This includes the main Catalog, Donors, Tickets, and Orders pages, plus all of the detailed report pages. All data pages have a few controls in common; learning to use these is the key to being able to extract the data you want from the software.

Learn how here: [Help Docs: Using Data Pages](#)

## Donate Now Page

A special page in our software for taking monetary donations over the web. By default, there is a button on your event-site homepage that links to it. This page can also be extended to perform as a simple online store for fixed-price items.

## Donors

Donors are the people or businesses that give you items to sell. Every item you plan to sell (including raffle tickets, drink tickets, and other things you might not think have “donors”) needs to have a corresponding donor.

## Gala Auction

An event fundraiser, that usually includes a live auction and a silent auction, plus some mix of other fundraising vehicles (wine wall, games, raffle, signup parties, etc.)

# Glossary

## Guests

Supporters who come to your *gala auction*. In order to be a guest, a person must have a ticket assigned to them; all guests have bidder numbers assigned to them, and can be sold items through the software.

## Hybrid Auction

A fundraiser centered on a *Gala Auction* event, but that also incorporates *Online Auction* bidding either before or after the Gala. (For fundraisers with simultaneous in-person and online bidding, see *Mobile Bidding*.)

See also: Help Docs: [Transferring Online Items to Gala](#)

## Items

Includes anything you want your guests to be able to pay for. Silent auction items, live auction items, raffle tickets, paddle-raise pledges, and signup party slots are all items, and should be entered as items.

## Item Types

An item's type determines several factors—most importantly, what type of print collateral the software will generate for it.

See also: Help Docs: [Item Types](#)

# Glossary

## Mobile Bidding

A method for collecting bids and pledges at a *Gala Auction*. When you designate that an item will be sold via Mobile Bidding, guests will be able to use their smartphone or tablet to place and monitor their bids. If you want bidders who are not attending your gala to be able to bid on items alongside your gala auction guests, you must use Mobile Bidding.

See also: Help Docs: [Help Docs: Mobile Bidding](#)

## Online Auction

A fundraising auction where all of the bidding happens online, over multiple days.

See also: Help Docs: [Help Docs: Online Auction](#)

## Order

The primary record of a set of purchases made and paid for by a bidder. Should you need to return an item purchased by a guest, change the ticket type purchased by a guest, or refund an amount paid by a guest, the order is the place you go to do this.

## Ticket

The record in your SchoolAuction.net database that indicates that a given person is going to attend a *Gala Auction*. The assignment or purchase of a ticket gives that guest their *bidder number*, and allows them to check-in for your event and have items sold to them.

# How to Get Further Support

This is not your only resource for learning about our software.

We have extensive documentation online at [schoolauction.help](https://schoolauction.help). There's a search box at the top of that page, and you should try it out—it can often steer you to the answer you need quickly.

There are also links to individual documentation pages within the software itself—look for the help link in the upper right corner of each page.

Plus, we have videos illustrating most of the basic functions on our Youtube channel: [youtube.com/schoolauction](https://youtube.com/schoolauction)

When you get stuck, you can contact our support team. Email them at [support@schoolauction.net](mailto:support@schoolauction.net).

As mentioned on the first page of this document, there are as many ways to design an auction as there are auctions themselves. Our support team has experience in helping out users find ways to match our software's abilities to many of the different ways there are to do things, and will do their best to help you, too.